

Instructions for GMP Online Users

for telephone assistance 415/749-4994 (option 1)

Note: Do NOT include spaces or periods (“.”) in the username, password or file names of attachments. All username passwords must be a minimum of eight (8) digits long with at least one number, one uppercase and one lowercase letter.

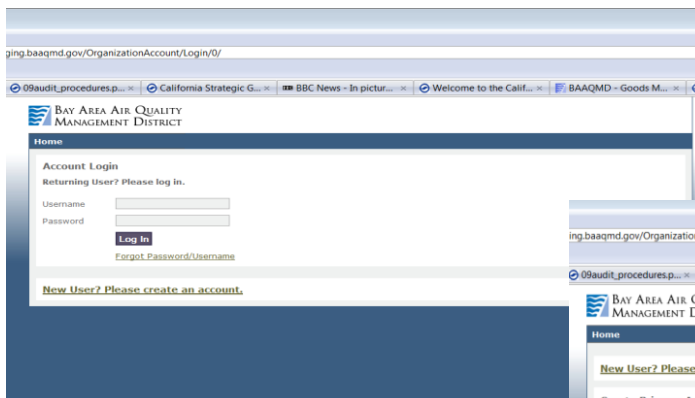
Definitions:

Organization: Your company, or if you are an independent owner-operator, your name. The name of the organization should read as closely to the way CA DMV has the ownership listed as possible.

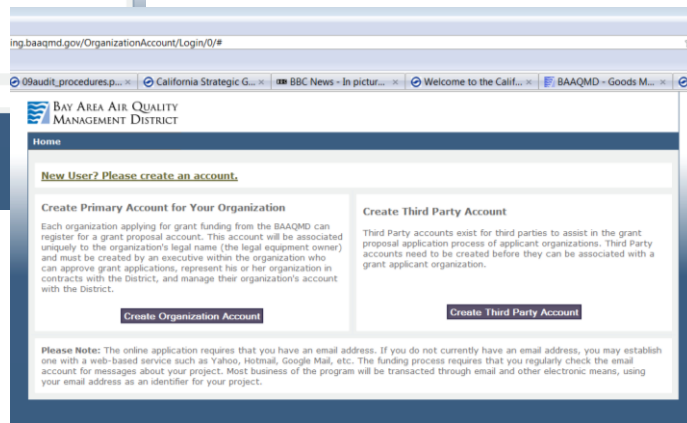
Third Party: At any time after you have created your Organization account and proposal, you may authorize a third party (other person like a relative, vendor, company staff) to edit and enter data into the proposal screens. The third party cannot create a proposal, initial certifications or sign & submit the proposal. You may change and delete third parties as necessary.

Signing Authority – The legal owner of a truck or fleet, in the case of company-owned trucks, the staff person or company official authorized to sign legal agreements or take on financial obligations for the organization.

Creating Primary Organization Account or Third Party Account

A screenshot of a web browser showing the login page for the Bay Area Air Quality Management District (BAAQMD). The page has a blue header with the BAAQMD logo and navigation links. Below the header, there is a 'Home' section with a 'New User? Please create an account.' link. The main content area is titled 'Account Login' and contains fields for 'Username' and 'Password', a 'Log In' button, and a 'Forgot Password/Username' link. The URL in the address bar is 'http://ing.baaqmd.gov/OrganizationAccount/Login/0/'.

To create a new applicant organization account, click on the “Create Organization Account” button, and to create a new third party organization account, click on the “Create 3rd party organization account”.

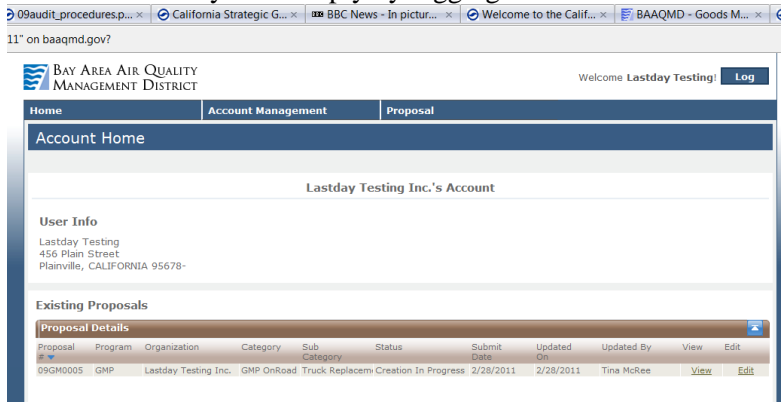
A screenshot of the BAAQMD account creation page. The page has a blue header with the BAAQMD logo and navigation links. Below the header, there is a 'Home' section with a 'New User? Please create an account.' link. The main content area is titled 'Create Primary Account for Your Organization' and 'Create Third Party Account'. The 'Create Primary Account for Your Organization' section contains text explaining that each organization applying for grant funding from the BAAQMD can register for a grant proposal account. The 'Create Third Party Account' section contains text explaining that third party accounts exist for third parties to assist in the grant proposal application process. At the bottom of the page, there is a 'Please Note' section with additional information. The URL in the address bar is 'http://ing.baaqmd.gov/OrganizationAccount/Login/0/#'.

There are three steps to creating a user account:

1. At the sign-in screen, click New User link and you will be directed to a form to complete contact information for yourself (as the primary contact) and your Organization. Only the legal owner, signing authority or other company authority can set up the Organizational account.
2. Complete information and press Create Organization Account, and a message will appear asking you to check your email.
3. On your email, you will be asked to click a link to the application website and this will redirect you to the sign-in screen again to enter your Username and Password. Until you complete this user activation process, you will be unable to sign into the online proposal system. Certain email programs send our email to Junk or Spam folders – be sure to check these folders on your email if you do not see the activation email from the District.

The system will only create one unique account by Organization name or by Third-party name. Users should make note of their account name and sign-on information to avoid errors. Upon account activation, an e-mail will be sent to the new user’s e-mail address with a link that the recipient must use to activate and log

into the new account. You cannot log into the system until you respond to this email. After activation, you can return to the system simply by logging in.



Each time you log into the system, you will see three tabs at the top: **Home** (returns you to system home screen); **Account Management** (allows you to manage your Organization or Third Party account); and **Proposal** (allows you to create or edit open proposals, view queue or manage Third Party permissions).

Third Party Authorization

Organization account owners have the

ability to grant access to a third party (vendor, contractor, etc.) to enter or edit proposal information pertaining to an existing proposal.

- A third party account not linked to a specific proposal may be created at any time by clicking Create Third Party Account from the main screen.
- Third parties do not have the ability to edit primary organization account information and create or submit proposals, nor can they sign the proposal or initial disclosures on the proposal form.
- The applicant, as the legal owner of the truck, is ultimately responsible for the final proposal information submitted. Please check your proposal for accuracy!

To authorize a third party click the **Proposal** tab at the top and select **Authorize Third Party**. The Organization user will be required to enter the third party account owner's e-mail address, then select the proposals that the third party has access to. The proposal needs to be created prior to third party authorization. Upon successfully authorizing third party, an e-mail notification will be sent to the third party account owner stating that access to the organizational proposal has been granted.



To update a third party account click the Proposal tab at the top and selecting Update Third Party. Primary organization users also have the ability to remove third party access by un-checking the checkbox next to the authorized proposal.

Create a New Proposal

After creating your Organization account, sign into the online system and select the **Proposal** tab at the top. From the list, select **Create New Goods Movement Proposal**.

There are four areas of information you will enter for the proposal for each truck:

1. General organization and contact information
2. Existing truck and engine information
3. New/Replacement truck or Retrofit Filter information for the project
4. Operational activity of the existing truck & updated truck (future use).

General screen hints:

- Required fields are indicated by an asterisk (*). If you do not enter data in a required field, the system will show an error message. Enter the missing information to continue.

- At the bottom of each screen, you are given several choices: Save and Continue saves data you have entered and goes to the next screen; Save and Close saves data and exits to the Home screen; Cancel or exiting a screen without saving will erase any data you have entered. Logging out (using button at top right of Home screen) or closing your browser window will log you off the system and you will need to sign in again.
- After completing the data entry for all truck(s) in the proposed project, the signing authority will be required to participate in data entry by initialing all certifications (see below) and signing the proposal.

Screen 1: Proposal General Information

Authorize person to sign contracts: (see definition above) If the primary project contact person and the *signing authority* for your company is not the same, please enter the signing authority information here. Only the signing authority can initial the certifications and sign the proposal.

Project type: Proposals are submitted according to project type (replacement, retrofit). If you wish to submit different types of projects, you must submit them by project type (you cannot mix the two in a single project). The online application is only for replacement and retrofit – for proposals of other project types, please contact the Program Office (grants@baaqmd.gov or 415-749-4994 (option 1)).

Fleet size: Enter your total fleet size, meaning all trucks over 14,000 GVWR owned by the applicant organization or independent truck driver/owner.

Number employees: List yourself and anyone else that is paid to work for your organization.

Annual Gross Income: Enter the amount of annual income for the applicant organization or independent owner-operator last year before taxes were taken out.

Payment option: Applicants are required to choose one of the two grant fund payment options.

- 1.) *Direct Payment* – Grant funds are sent directly to the vendor for the purchased equipment as a two-party check. This may require the grantee's signature before the vendor can cash the check. This form of payment typically takes 30-40 days.
- 2.) *Reimbursement payment* – Grants funds are paid directly to the grantee. Grantees are typically required to pay the vendor in-full before the equipment will be released to them. This form of payment typically takes 60 or more days.

Screen 2: Existing Vehicle Information

CA State Fleet Regulation – All vehicles over 14,000 GVWR are subject to CA regulation. Users are required to select the fleet regulation that most closely applies to the truck.

Registered Owner – Enter the legal owner's name as it appears on the current CA DMV registration for the truck (may not be the same as your/the applicant name).

Address information on the existing vehicle screen should record the operating location of the truck (for example: fleets with terminals or yards in various locations may enter an address different from their main company address). Enter the address where the vehicle is parked/located.

Vocation – Enter the primary usage of your truck; select only ONE choice that best matches how the truck is used most of the time.

Gross Vehicle Weight Rating (GVWR)/Combined Gross Weight Rating (CGWR): The GVWR and/or CGWR are ratings labeled by the truck's manufacturer, and can be found on the manufacturer label located in the truck cab. This is not the same as declared GVWR on your DMV registration.

Screen 3: Retrofit Information (Retrofits Only)

Information on this screen can be taken from your vendor quotation/cost estimate. Please complete all fields. If your 1993-1998 engine requires low-NOx recalibration (“reflash”), please enter the status of your reflash here.

Screen 3: New Equipment (Replacements Only)

Information on this screen can be taken from your dealer quotation/cost estimate. Please complete all fields.

Selecting the correct funding amount:

For detailed information about selecting the appropriate funding amount based on your truck GVWR, truck type (port, non-port) and length of contract (for retrofits), please refer to the CA Air Resources Board document “Operational Deadlines” on our website (www.baaqmd.gov/goods). Applicants must select one funding option and cannot change this funding selection after the close of the proposal period (currently April 30, 2011).

Screen 4: Operational Activity

Current Odometer: Enter current (today’s) odometer reading for this truck. If you are unable to enter an odometer reading (e.g., broken meter, etc.) you must contact our staff for assistance. Applicants must provide proof of annual vehicle mileage to participate. There may be alternate ways to document annual mileage.

Port Activity Questions: If you enter a CA Port or intermodal railyard with this truck, please answer the questions about port activity. To estimate the annual number of visits, it is sometimes easier to consider how many visits per month you make to the ports or railyards (multiply by 12).

Trade Corridor Activity – Enter the percentage of your total mileage/operating time that you travel in each trade corridor (for example, if a truck drove 10,000 miles last year between the Bay Area and the Central Valley, trade corridor percentage would be 50% in the Bay Area and 50% in the Central Valley).

Additionally, applicants enter the percentage of miles driven in California within the past year and estimate what percent of the time they will drive in California with their updated truck. (The trade corridor map is located at the bottom of the BAAQMD Goods Movement webpage).

Upload Attachments

After completing the Operational Activity page for this truck, you will be asked what you wish to do next (Equipment Action). Proposals are not considered complete until attachments are submitted.

There are three ways to submit attachments:

- Attach electronically to your online proposal, when attaching electronic documents, each file name must be different or they will over-write each other (previous documents will be lost); do not include spaces or periods (“.”) in your attachment file names (except for those automatically inserted before the file type, e.g., .jpg, .wpd, .pdf, etc. – these are ok)
- Fax to 415-749-5020 with your project number written on the documents,
- Mail attachments to the program office with project number written on them. All mailings must be received by 3:00pm, Saturday April 30, 2011:

District Mailing Address: **BAAQMD/GMP, 939 Ellis Street, San Francisco CA 94109**

The screenshot shows a web application interface for BAAQMD Goods Movement. The main page is titled 'Truck Details' and contains several sections: 'Truck Details' with a question about California port property, 'Trade Corridor Activity' with a question about trade corridor map, and 'Previous Activity' with a table for 'Vehicle Miles Traveled'. A modal dialog box titled 'Equipment Action' is open, asking 'What do you want to do next?' and providing buttons for 'Go To Attachments', 'Proposal Home', 'Cancel', and 'Add new Equipment'. Below the dialog box, there are input fields for 'Current Year', '2010', '2005', and 'Estimated Future Annual Usage', along with a table for 'Vehicle Miles Traveled'.

Attachments: GMP OnRoad Truck Replacement

Previous Page Continue Exit

The following attachments may be submitted for this proposal:

- Mileage Documentation
- Port Visit Documentation
- Current DMV registration
- Insurance Documentation
- Vendor Quote
- Finance Documentation
- Executive Order
- Owner Photo ID

If you do not attach the proper documents to your application file, you may be required to submit them to BAAQMD before your application will be considered complete. Required documents can be submitted by mail, e-mail, or fax, or attached to this electronic file at a later time by returning to this page and following the on screen upload instructions. Attachments that are submitted offline must be accompanied by the attachments cover sheet that includes your Goods Movement project number. Please click the button below to download the attachments cover sheet.

Download Attachment Cover Sheet

Attachment Type → Current DMV registration

File Name Browse...

Comments

Upload

File Name	Submitted By	Submitted On	Attachment Type	Comments	Remove
Equipment_uploads.doc	Samantha Ayler	2/27/2013 9:17:13 PM	Mileage Documentation		Remove
Equipment_Application_12080001.pdf	Samantha Ayler	2/27/2013 9:18:33 PM	Proposal Application: Initial application submitter		Remove

As you select a document type on the pulldown list, you will see a detailed description of that document. Attach electronic documents by selecting the correct document type from the pulldown menu, browsing your computer for that document and pressing upload when the document appears in the browsing box on the online system.

Add New Equipment – The Equipment Action box also gives you the option to add new equipment. This feature allows you to enter the next truck for your replacement or retrofit project without exiting and re-entering the system. If you have similar trucks or a large number of trucks to enter, you may wish to use the **Copy** feature.

Using Copy feature: Enter all information for your first truck in this project. When the Equipment Action dialog box appears, select Proposal Home option which will allow you to view your queue. You will view the current truck on the queue with options to Edit, Copy or Delete. Press Copy and a copied line will appear, click Edit on this line and you can simply adjust the different data for the new truck on your proposal. For large fleets, you may want to enter data according to trucks that are most similar so that you can copy similar trucks and have fewer fields to update on the proposal screens.

Home	Account Management	Accounting	Proposal
Proposal Number: 09GM0005	Proposal Status: Creation In Progress		
Proposal Type: GMP OnRoad	Proposal Sub Type: Truck Replacement		
Organization: Lastday Testing Inc.	Organization Contact: Lastday Testing		
Email: tkmcree@yahoo.com	Phone: (415) 123-4567 x 89		

Equipments in Proposal						
Secondary Proposal#	VIN	Unit Number	Status	Edit/View	Create Copy	Delete
1	123456789012	125	Creation In Progress	Edt	Copy	Delete
2	4	124	Creation In Progress	Edt	Copy	Delete
3	47	124	Creation In Progress	Edt	Copy	Delete

Screen 5: Initial Certifications (disclosures) and Sign Proposal Form

When you have completed all data entry for the trucks in your project, an optional survey screen will appear. Press save and continue after entering information on this screen and you will see the required certifications (or “disclosures”) that must each be initialed by the legal owner/signing authority. The signing authority must sign the proposal form at the bottom.

Definitions of some confusing terms:

- “Match funding” refers to the grantee portion – for example, if your project costs \$125,000 and your grant is \$50,000, the match funding will be \$75,000.
- “Other incentives” refers to any other funding that you will receive (especially from public sources) for this same equipment project.
- Air quality violations (e.g., opacity, idling) apply to all trucks in a single fleet. If any truck in your fleet has an unpaid (outstanding) citation, all trucks in your project may not be considered for funding. Please pay outstanding violations prior to submitting your proposal.

Submitting the proposal

If you are ready to submit the proposal, click Sign & Submit. Once submitted, you will not be able to enter or change information in the proposal although you can upload attachments until the proposal deadline. If you may need to change information in your proposal, leave your proposal unsubmitted until a later date and submit prior to the proposal deadline. If you wish to correct information in a submitted proposal, you must call the Program Office (415/749-4994 (option 1)) for assistance. After you submit your proposal, an email containing a PDF copy of your proposal will be sent to your email address.